

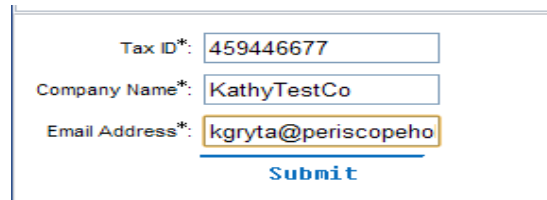
Vendor Registration Quick Reference Guide

Beginning the Registration Process

In order to receive notifications about bid opportunities or to be issued purchase orders (POs) through ePro, vendors must be registered within the system. Vendors register themselves by accessing the ePro login screen and selecting **Register**.

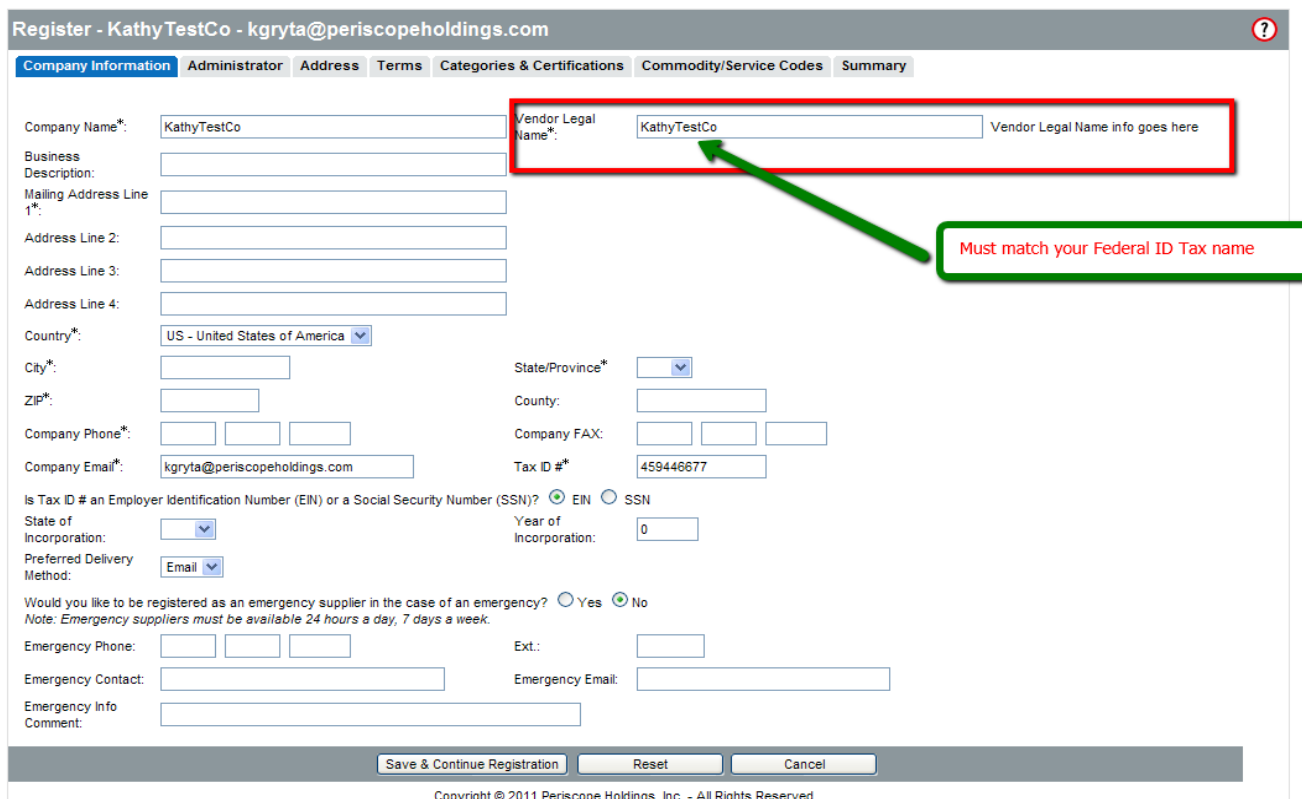
Providing General Information

When you click on **Register**, a pop-up window will appear. Enter your company's Federal Tax Identification Number and name, or your Social Security number and name. If your tax ID is already registered, you will be notified that you cannot complete the registration process. If you are a foreign vendor, call the Help Desk (see number above) for assistance.



Tax ID*: 459446677
Company Name*: KathyTestCo
Email Address*: kgryta@periscopeho
Submit

If your tax ID is new to the system, a **Register** screen will appear. In the **Company Information** section, supply your company's official address and contact information. Note that the Vendor Legal Name field must match the name registered with the Internal Revenue Service for your federal tax ID number.



Register - KathyTestCo - kgryta@periscopeholdings.com

Company Information | Administrator | Address | Terms | Categories & Certifications | Commodity/Service Codes | Summary

Company Name*: KathyTestCo
Business Description:
Mailing Address Line 1*:
Address Line 2:
Address Line 3:
Address Line 4:
Country*: US - United States of America
City*:
ZIP*:
Company Phone*:
Company Email*: kgryta@periscopeholdings.com
Is Tax ID # an Employer Identification Number (EIN) or a Social Security Number (SSN)? ☒ EIN ☐ SSN
State of Incorporation:
Preferred Delivery Method: Email
Would you like to be registered as an emergency supplier in the case of an emergency? ☐ Yes ☒ No
Note: Emergency suppliers must be available 24 hours a day, 7 days a week.
Emergency Phone: Ext.:
Emergency Contact: Emergency Email:
Emergency Info Comment:

Vendor Legal Name*: KathyTestCo Vendor Legal Name info goes here

Must match your Federal ID Tax name

Save & Continue Registration Reset Cancel

Copyright © 2011 Periscope Holdings, Inc. - All Rights Reserved.

In the **Administrative User Information** section, provide the information for an administrative user for your organization in the system. This user will be designated as the **"Seller Administrator"** and will be responsible for updating organizational information and adding new users.

Note: The Login ID and Password must be 5-20 characters long, containing at least one letter, and one number and must be unique in the system. A duplicate Login ID will result in an error screen. The initial password is temporary and will need to be changed the first time you log in. At this time, a login question and answer must be provided – this will enable your administrator to access the Forgot Password link in case of a forgotten password.

Vendor Registration Quick Reference Guide

Register - KathyTestCo - kgryta@periscopeholdings.com

Company Information Administrator Address Terms Categories & Certifications Commodity/Service Codes Summary

Administrative User Information

Salutation:

First Name*: Last Name*:

Job Title*: Department:

Email*: Phone*:

Login ID*:

New Password*: Confirm Password*:

Login Question*: Login Answer*:

What is your favorite food?
What city were you born in?
What is your father's middle name?
What is your mother's middle name?

Continue Registration Reset Cancel

Copyright © 2011 Periscope Holdings, Inc. - All Rights Reserved.

Once complete, you may select to **Add Another Address** (Remit-to, Bid, etc.) or to **Continue Registration**.

Register - KathyTestCo - kgryta@periscopeholdings.com

Company Information Administrator Address Terms Categories & Certifications Commodity/Service Codes Summary

Maintain Addresses for: KathyTestCo

Name	Address Type	Address Information	Status	Default for Type
General	General Mailing Address	Kathy Gryta 211 E. 7th Street Austin, TX 78701 US Email: kgryta@periscopeholdings.com Phone: (512)555-1212	Active	Yes

Add Another Address Continue Registration

Copyright © 2011 Periscope Holdings, Inc. - All Rights Reserved.

If you add addresses, you may elect to designate default PO, Bid, and Remit addresses.

Enter a New Address

Address Type:

Name this Address*:

Contact Name*:

Address Line 1*:

Address Line 2:

Address Line 3:

Address Line 4:

Country*:

City*: State/Province*:

ZIP*: County:

Phone*: Ext:

Toll Free: Mobile:

Fax: Email*:

Status: ☒ Active

☒ Default address for this address type

Save & Add Another Save & Continue Registration Reset Cancel & Continue Registration

Copyright © 2011 Periscope Holdings, Inc. - All Rights Reserved.

Vendor Registration

Quick Reference Guide

Help Desk: (855) 800-5046

Selecting Your Terms, Categories and Certifications

As you continue the registration process, you will be taken to the **Terms Tab**, which offers the County's standard options.

Register - KathyTestCo - kgryta@periscopeholdings.com

Company Information Administrator Address **Terms** Categories & Certifications Commodity/Service Codes Summary

Payment Terms: Net 30

Shipping Terms: F.O.B., Destination

Save & Continue Registration

Continue Registration

Copyright © 2011 Periscope Holdings, Inc. - All Rights Reserved.

Save & Continue to go to the **Categories and Certifications** screen. Here you are asked to designate your status for various categories and certifications requested by the County.

Register - KathyTestCo - kgryta@periscopeholdings.com

Company Information Administrator Address Terms **Categories & Certifications** Commodity/Service Codes Summary

Category: 1099 Type -- if unknown or not applicable, select 10

Please select exactly one category value

Select

☐

1-Rents

☐

10-Crop Insurance Proceeds

☐

13-Excess Golden Parachute Payments

☐

14-Gross Proceeds Paid to an Attorney

☐

15a-Section 409A deferrals

☐

15b-Section 409A income

☐

16-State tax withheld

☐

2-Royalties

☐

3-Other Income

☐

4-Federal Income Tax Withheld

☐

5-Fishing Boat Proceeds

☐

6-Medical and Health Care Payments

☐

7-Non-employee Compensation

☐

8-Substitute Payments

NOTE: these categories are configured by each client, and may be different for different agencies.

Notes:

Save & Add Certification

Save & Continue Registration

Continue Registration

After you have completed this screen, click **Save & Continue Registration** at the bottom of the screen.

Registering for Commodity Codes

The last step in the registration process is to select the commodities and services that you provide. The commodity codes you select will be used to determine which notifications you will receive regarding bid opportunities available for your product or services.

The **Commodity and Service Codes** screen allows you to search for the National Institute of Governmental Purchasing (NIGP) Codes that correspond with what you offer. You can peruse general categories of commodities and services, or search by keyword. Click **Save and Add** to list additional commodity codes. Once you have selected all the codes that match what you provide, select **Save and Continue Registration**.

Register - KathyTestCo - kgryta@periscopeholdings.com

Company Information
Administrator
Address
Terms
Categories & Certifications
Commodity/Service Codes
Summary

Search

NIGP Class
NIGP Class Item
NIGP Keyword
Search using
ALL of the criteria
Search

Use the NIGP Commodity Code Search Engine if you are familiar with the NIGP code. If not use the NIGP Code Browse below.

NIGP Code Browse

Select the category that best describes the product and service you offer. Click on the question mark for more information.

01	Administrative, Financial, and Management Services
02	Agricultural Equipment and Related Products and Services
03	Arts, Crafts, Entertainment, Theatre
04	Automotive Products, Vehicles, and Services
05	Building Equipment, Supplies, and Services
06	Clothing, Textiles, Laundry Equipment, and Supplies
07	Communication Equipment and Services
08	Computers, Software, Supplies, and Services

What happens next?

Thank you for completing the self-registration process with the County of San Bernardino ePro electronic procurement system. A message will be sent to the email address you provided within the **Company Information** to confirm that your registration is complete. If your registration is not complete at this point, you will receive an email with information about how to return to ePro to complete the process.